DOCUMENT RESUME

ED 391 550 JC 960 106

AUTHOR Clagett, Craig A.
TITLE Annual Market Analysis. Report MA96-4.
INSTITUTION Prince George's Community Coll., Largo, Md.
PUB DATE Feb 96
NOTE 61p.
PUB TYPE Reports - Descriptive (141)

EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS *College Planning; Community Colleges; Enrollment; *Enrollment Influences; *Enrollment Management; Enrollment Rate; *Enrollment Trends; High School Students; School Community Relationship; *Student Characteristics; *Student Recruitment; Two Year Colleges
IDENTIFIERS *Prince Georges Community College MD

ABSTRACT

Each year, Prince George's Community College (PGCC), in Maryland, prepares a market analysis report to assist the college's enrollment management team in planning recruitment and promotional campaigns aimed at increasing credit student enrollment. This report provides the analysis as of fiscal year 1995 and includes historical data from past years to identify trends. The report is divided into the following sections: (1) a current student profile, including number of students, demographics, fall enrollment trends, summer session attendance, student incomes, and financial aid needs; (2) characteristics of first-time college students at PGCC, including goals and plans, socioeconomic status, and academic and socio-cultural background; (3) market share analysis, focusing on the proportion of Prince George County residents attending college in Maryland and PGCC; (4) comparative statistics on the numbers of credit students at PGCC and other Maryland institutions; (5) reasons why potential students fail to enroll at PGCC, examining financial issues, enrollment at other institutions, work schedule conflicts, and transportation difficulties; (6) an analysis of the high school student market, indicating that PGCC enrolls more county high school graduates than any other Maryland four-year college or university; (7) an assessment the adult higher education market in the county, presenting results of a spring 1995 survey of community perceptions of PGCC; and (8) enrollment objectives of PGCC's fall 1995 marketing plan. Tables of enrollment and survey data are included. (TGI)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED 391 550

Annual Market Analysis

PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

C. Clagett

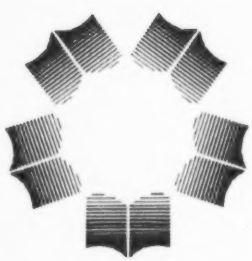
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC).

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

This document has been reproduced as received from the person or organization originating it.

Minor changes have been made to improve reproduction quality.

Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.



PRINCE GEORGE'S
COMMUNITY COLLEGE

Report MA96-4

February 1996

JC 960 106

BEST COPY AVAILABLE

Annual Market Analysis

Presented to the Marketing Council of
Prince George's Community College
February 1996

Prepared by

Craig A. Clagett
Director of Institutional Research and Analysis

CONTENTS

Current Student Profile	1
Characteristics of First-time Students	13
Market Share Analysis	23
The Competition	25
Why Do Some Applicants Not Enroll?	31
The High School Student Market	38
Assessing the Adult Market in the County	49

PRINCE GEORGE'S COMMUNITY COLLEGE
Office of Institutional Research and Analysis

ANNUAL MARKET ANALYSIS
Market Analysis MA96-4
February 1996

Overview

The Office of Institutional Research and Analysis has prepared this *Annual Market Analysis* to assist the college's Marketing Council and enrollment management team in planning recruitment and promotional campaigns aimed at increasing credit student enrollment. Included in this report are profiles of current students, findings from a survey of fall 1992 entrants, analyses of the college's share of the higher education market, identification of major competitors for credit students, reasons why some applicants fail to enroll, a detailed analysis of the high school market, findings from a summer 1995 telephone survey of county adults, and current enrollment objectives adopted by the college's Marketing Council. The research office welcomes suggestions as to what might be included in future credit student market analyses.

This report draws upon the major findings of several market research studies conducted by the Office of Institutional Research and Analysis over the past few years. For readability and brevity, many details, including discussions of methodologies and sources, have been omitted. Readers desiring more information than provided in this summary report may request complete copies of the original reports, which are listed in the *FY86-95 OIRA Publications List* available from OIRA at x0723.

Current Student Profile

This section of the *Annual Market Analysis* presents recent student enrollment data to describe who our current students are. After an overview of the magnitude of our enrollment, in credit and noncredit courses, the analysis describes selected credit student characteristics.

Number of Students Served

How many students attend classes at PGCC during the year? The Office of Institutional Research and Analysis has conducted an analysis each year since FY87 that answers this question. The analysis identifies every individual that is enrolled in

a credit or noncredit course (as of the official statistical reporting date) during a given fiscal year. Credit and noncredit files are merged by student identification number so an unduplicated count can be calculated. Each student is classified as having taken only credit, only noncredit, or both credit and noncredit classes during the year. Summing all three mutually exclusive categories yields the total number of students served during the year. Summing the "credit only" and "both credit and noncredit" categories yields the total number of students enrolling in credit courses during the year. A similar calculation provides the total number of students attending noncredit courses. Annual unduplicated headcount figures for the past nine fiscal years are shown in the following table:

Annual Unduplicated Headcount, FY87-95

Year	Credit Only	Noncredit Only	Both C & NC	Total Credit	Total Non-Cred	Total Headcount
FY95	16,474	17,471	1,155	17,629	18,626	35,100
FY94	17,267	16,975	1,155	18,422	18,130	35,397
FY93	17,968	17,063	1,220	19,188	18,283	36,251
FY92	18,151	18,046	1,258	19,409	19,304	37,455
FY91	17,993	17,952	1,287	19,280	19,239	37,232
FY90	18,113	19,878	1,394	19,507	21,272	39,385
FY89	17,957	17,993	1,431	19,388	19,424	37,381
FY88	17,599	18,869	1,337	18,936	20,206	37,805
FY87	17,527	17,852	1,167	18,694	19,019	36,546

Ninety-six percent (or 16,995) of the 17,629 students taking credit classes during fiscal year 1995 were residents of Prince George's County. Residents of other Maryland jurisdictions numbered 386, while out-of-state residents totaled 248. Comparing the number of county residents attending the college with the most recent county population estimates released by the Maryland Office of Planning permits calculation of enrollment rates by age. County residents in their twenties had the highest rate of PGCC enrollment, with over six percent attending the college. Overall, 2.8 percent of Prince George's County residents age 15 or older enrolled in a credit course at PGCC at some time between July 1, 1994 and June 30, 1995.

Enrollment of County Residents at PGCC in Credit Courses, by Age Group, FY95			
Age	County Population	Attended PGCC	Enrollment Rate
15 - 19	49,187	2,185	4.44%
20 - 29	129,146	8,161	6.31%
30 - 39	145,834	3,841	2.63%
40 - 49	118,971	1,917	1.61%
50 - 59	77,450	471	0.60%
60 and older	83,230	420	0.50%
Total 15+ years	603,818	16,995	2.81%

Demographic Characteristics

Sixty-three percent (11,050 students) of the 17,629 students taking credit courses at PGCC during fiscal year 1995 were women. Women have accounted for over three-fifths of the college's credit students for several years.

Students of African descent accounted for 62 percent of the credit students in FY95. The proportion of credit students at PGCC of African descent has been increasing steadily. African Americans became a majority in FY92. Prince George's Community College enrolls more African American students than any other college in Maryland.

White students accounted for 29 percent of the college's credit students in fiscal year 1995. Whites last accounted for a majority of the college's credit students in FY88. Six percent of the college's students in FY95 were of Asian descent. Hispanics comprised three percent, and Native Americans less than one percent.

Nearly half (48 percent) of the college's credit students in FY95 were 20 to 29 years of age. People in the thirties accounted for an additional 23 percent. Together, students in their twenties and thirties comprised over 70 percent of the college's credit enrollment. Students under 20 years of age accounted for 13 percent of the college's headcount enrollment. Fourteen percent of PGCC's credit students were in their forties or fifties; seniors (age 60+) accounted for the remaining two percent.

Demographic Characteristics of Credit Students Annual Unduplicated Headcount, FY92-95				
	FY92	FY93	FY94	FY95
Female	11,977	11,928	11,346	11,050
Male	7,432	7,260	7,076	6,579
African	10,544	10,935	10,847	10,849
Asian	991	1,061	1,092	1,046
Hispanic	427	435	442	479
Native American	94	114	123	120
White	7,353	6,643	5,918	5,135
Under 20 years	2,217	2,095	1,992	2,248
20 - 29	10,223	9,850	9,250	8,426
30 - 39	4,077	4,284	4,220	4,008
40 - 49	1,909	1,989	2,015	2,007
50 - 59	500	522	535	501
60 and older	483	448	410	439
Total	19,409	19,188	18,422	17,629

Recent Fall Enrollment Trend

The college's highest fall headcount occurred in 1982, when PGCC enrolled 15,354 credit students. Since then, despite a growing county population, credit headcount has fluctuated around an average of about 13,150 students. Fall headcount enrollment has declined the last three years. Fall 1995 headcount of 12,050 was the lowest at the college since 1976.

Accompanying the overall trend of declining headcount, the average number of credit hours taken by students has declined. In 1982, the college's record student headcount took an average of 7.73 credits, generating 118,654 credit hours. The average student load has generally declined since then. After falling to an all-time low of 7.18 in fall 1994, the average credit hour load rose to 7.25 in fall 1995. As of the

Fall 1995 official third week statistical date, the college enrolled 12,050 students who generated 87,422 credit hours. Fall credit enrollment data for the past six years is displayed in the following table:

Headcount, Credit Hours, and Average Load, Fall 1990-95						
	1990	1991	1992	1993	1994	1995
Headcount	13,087	13,307	13,318	12,955	12,201	12,050
Credit Hours	96,960	97,055	96,762	94,119	87,544	87,422
Average load	7.41	7.29	7.27	7.27	7.18	7.25

The number of full-time students (carrying 12 or more credits) increased 1.6 percent between fall 1994 and fall 1995. Students carrying 6 to 11 credits essentially were unchanged in number, while the number of students taking just one class declined:

Change in Credit Hour Loads, Fall 1994-95				
Credit Hour Load	Fall 1994	Fall 1995	Number Change	Percent Change
1 - 3	3,238	3,038	(200)	-6.2%
1 - 6	6,452	6,316	(136)	-2.1%
1 - 11	9,306	9,110	(196)	-2.1%
6 - 11	4,558	4,550	(8)	-0.2%
12 +	2,895	2,940	45	1.6%

Student Attendance Patterns

Courses on the Largo campus are most popular among PGCC students, with nearly nine in ten students attending at least one class on the main campus. Slightly over half of the college's credit students attend at least one weekday class at Largo. Evening classes on campus have been attended by 36-37 percent of PGCC's credit students the last two fall terms. One in every six PGCC students enrolled in an extension center course. Three to four percent of the college's students take telecredit courses in the fall.

The following table shows the number of students in fall 1994 and fall 1995 taking courses by location and time of day. Since student schedules may include more than one type of course, the category totals do not sum to the total headcount and percents do not add to 100.

Credit Students by Course Location and Time				
Location and Time	Number of Students		Percent of Students	
	Fall 94	Fall 95	Fall 94	Fall 95
Any Largo Courses	10,620	10,669	87%	89%
Largo Day	6,481	6,469	53%	54%
Largo Saturday	606	659	5%	5%
Largo Weekend	591	588	5%	5%
Largo Evening	4,392	4,441	36%	37%
Any Extension	2,039	1,890	17%	16%
Extension Day	101	118	1%	1%
Extension Saturday	80	141	1%	1%
Extension Weekend	162	200	1%	2%
Extension Evening	1,752	1,539	14%	13%
Telecredit	416	481	3%	4%
Total headcount	12,201	12,050	100%	100%

Summer Session Attendance

The majority of students attending summer sessions are continuing their studies from the prior spring. About one in ten summer students are new to college. Readmits account for 15 to 20 percent of summer students, similar to the proportion experienced in fall and spring terms. Summers differ from fall and spring in the proportion of students who are new transfers to PGCC. Students new to the

community college who have attended college elsewhere account for 14 to 18 percent of summer session students, compared to only 11 percent of fall students and 7 percent of spring students.

Entry Status of Summer Session Students
Summer Sessions 1992 through 1995
Number of Students

Entry Status	1992		1993		1994		1995	
	I	II	I	II	I	II	I	II
Continuing from Spring	1,724	1,384	1,687	1,416	1,729	1,199	1,529	1,290
New Transfers	408	428	470	423	425	358	445	415
Readmitted Students	624	341	616	364	590	315	560	360
First-time any College	261	250	197	187	217	196	268	241
Headcount	3,017	2,403	2,970	2,390	2,961	2,068	2,802	2,306

Entry Status of Summer Session Students
Summer Sessions 1992 through 1995
Percent of Headcount

Entry Status	1992		1993		1994		1995	
	I	II	I	II	I	II	I	II
Continuing from Spring	57%	58%	57%	59%	58%	58%	55%	56%
New Transfers	14%	18%	16%	18%	14%	17%	16%	18%
Readmitted Students	21%	14%	21%	15%	20%	15%	20%	16%
First-time any College	9%	10%	7%	8%	7%	10%	10%	11%
Headcount	3,017	2,403	2,970	2,390	2,961	2,068	2,802	2,306

Level of College Preparedness

Seven of every ten students entering PGCC in Fall 1995 who completed the placement test battery in all three skill areas (reading, English composition, and mathematics) had test scores indicating a need for remediation in at least one area. A fifth of the tested students needed remediation in all three areas:

Remedial Needs of Fall 1995 Entrants Tested in All Three Skill Areas		
Tested in all three areas	1,866	100%
No remediation needed	555	30%
Remediation needed	**1,311**	**70%**
In one area	605	32%
In two areas	313	17%
In three areas	393	21%

The proportion of students needing remediation in at least one area was 70 percent, down two percentage points from fall 1994:

Percent of Entering Students Tested in All Three Skill Areas Needing Remediation in at Least One Area		
	Tested in All Three Skill Areas	Percent Needing Remediation
Fall 1995	1,866	70%
Fall 1994	1,800	72%
Fall 1993	1,913	70%
Fall 1992	1,841	71%
Fall 1991	1,923	66%
Fall 1990	2,081	60%

Since 1992, marking the implementation of the Descriptive Tests of Language and Mathematics Skills as the college's placement test battery (replacing the Comparative Guidance and Placement Tests), mathematics has been the area of greatest remedial need among entering students. (At the time of test crossover from

the CGP to the DTLS tests, an effort to establish equivalent threshold scores for determining the need for remediation was made based on a regression analysis of test scores of a pilot group of students who had taken both test batteries. The process was different for mathematics. A committee of math faculty reviewed the new DTMS test, item by item, to determine what skills should be required for students entering math classes with an algebra pre-requisite. Thus, the new threshold for mathematics reflects a changed standard.)

The percentage of entering students needing remediation in mathematics declined from 65 to 61 percent in fall 1995. The proportion of students needing developmental reading has been declining steadily, though modestly, over the past four years. The percentage of new students needing developmental English was unchanged from last year:

Percent of Students Tested in Each Skill Area Needing Remediation, Fall 1992-1995

	1992	1993	1994	1995
Mathematics	60% (1,996)	57% (2,090)	65% (1,963)	61% (2,034)
Reading	35% (1,919)	34% (2,029)	32% (1,954)	31% (1,988)
English	36% (1,935)	33% (2,030)	35% (1,887)	35% (1,937)

It is clear, given current score cutoffs, that mathematics is the skill area that entering students are most deficient in. Course pass rates support this, as classes in mathematics, and courses needing mathematics such as chemistry, have traditionally been the most difficult for PGCC students.

Student Incomes

The research office is frequently asked about the incomes of PGCC students. Since the college has not routinely required this information in its application, no long-term, consistent trend data exist. The best data available are described below.

Survey of Fall 1992 Entrants. A four-page questionnaire was mailed in October 1992 to all 2,730 first-time students enrolled in fall 1992. The questionnaire included a question "What is the approximate total pre-tax income of the people in your

household? Include your parents' or spouse/partner's income if they live with you. Do not include the income of non-family roommates." The following table presents a percentage distribution of the responses from the 949 students returning the survey:

Total Household Income Fall 1992 Entering Students (Self-reported Survey Data, N = 949)	
Income Range	Percent
Less than $5,000	5%
$ 5,000 - 9,999	3%
$10,000 - 19,999	12%
$20,000 - 29,999	17%
$30,000 - 39,999	16%
$40,000 - 49,999	14%
$50,000 - 74,999	22%
$75,000 - 99,999	7%
$100,000 and above	3%

Application Data, 1992-1994. For approximately two years, the college did ask for household income on its application. The data were separated from the rest of the application and not entered into the student information system on confidentiality grounds. The tear-off sheets were forwarded to institutional research for file creation and analysis. This procedure precluded identification of those applicants actually enrolling at the college. Thus the data in the following table reflect *applicants* to the college, including people who never attended.

Total Household Income PGCC Applicants, 1992-Summer 1994 (N = 8,572)	
Income Range	Percent
Less than $6,000	7%
$ 6,000 - 11,999	6%
$12,000 - 17,999	8%
$18,000 - 23,999	11%
$24,000 - 29,999	12%
$30,000 - 35,999	11%
$36,000 - 41,999	9%
$42,000 - 47,999	6%
$48,000 - 53,999	8%
$54,000 - 59,999	6%
$60,000 and above	18%

IRAHE Survey, Spring 1994. In spring 1994, Prince George's Community College participated in a national research project on the circumstances, aspirations, and needs of adult students. The study was designed and coordinated by the Institute for Research on Adults in Higher Education (IRAHE), located at the University of Maryland University College. The IRAHE survey instrument was mailed to 4,015 PGCC students enrolled in spring 1994. The survey achieved a 30 percent adjusted response rate. The percentage distribution in the following table reflects weighted responses, to be more representative of the college's total student population. These data are the most recent on PGCC student incomes. The question wording was "What is your household annual income before taxes?"

Total Household Income IRAHE Survey of Spring 1994 Students (Self-reported Survey Data, N = 1,083)	
Income Range	Percent
Less than $5,000	7%
$ 5,000 - 14,999	11%
$15,000 - 24,999	17%
$25,000 - 39,999	23%
$40,000 - 59,999	23%
$60,000 and above	19%

Financial Aid Needs

In these times of declining public support for higher education, more of the cost of a college education is being shifted to the student consumer in terms of higher tuition and fees. Financial aid, in the forms of grants, loans, scholarships, and student employment, can ease the burden for some students. In FY95, nearly a quarter of the college's students received some form of aid:

Percent of Students Receiving Financial Aid, FY92-95			
Year	Annual Unduplicated Headcount	Financial Aid Recipients	Percent Receiving Aid
1991-92	19,409	3,468	17.9%
1992-93	19,188	3,468	18.1%
1993-94	18,422	4,046	22.0%
1994-95	17,629	4,270	24.2%

Total financial aid in FY95 exceeded five million dollars:

Financial Aid Awarded in Fiscal Years 1992-95			
Year	Financial Aid Recipients	Number of Awards	Total Dollar Amount Awarded
1991-92	3,468	3,886	$3,588,738
1992-93	3,468	4,521	4,575,099
1993-94	4,046	4,615	4,915,066
1994-95	4,270	4,880	5,305,715

Characteristics of First-time College Students Entering PGCC

As an open-admissions college emphasizing ease of accessibility, PGCC asks for a minimum of information during its application process. As a result, data available on the student information system is limited to basic demographics and student attendance descriptors. To learn more about student goals, motivations, intentions, academic background, and home environment, OIRA conducted a survey of entering students in fall 1992. Though now somewhat dated, this survey provides the most comprehensive look available at the characteristics of first-time students entering the college.

Questionnaires were mailed in October 1992 to all 2,730 first-time students enrolled in fall 1992. A total of 949 students responded; adjusting for undeliverables, the overall response rate was 35 percent.

Goals and Plans

Half of the respondents said they intended to earn an Associate degree from PGCC. A third indicated they planned to take courses for transfer but did not plan on earning an award from the college. Twelve percent had no credential in mind, with the remaining three percent pursuing a certificate from PGCC:

What Do You Plan to Do at PGCC?	
Earn an Associate degree from PGCC	51%
Take courses for transfer without earning a PGCC award	34
Take courses/not working toward a degree or certificate	12
Earn a one-year certificate from PGCC	3

When asked why they were taking classes at PGCC, two-fifths of the respondents said they were preparing to transfer to a four-year college. A fifth were preparing for a career or job change. Eleven percent were preparing for a first job or career; a similar percentage was attending to update skills for a current job. Eight percent stated that they were exploring their options, trying to decide what they wanted to do. Other reasons were cited by less than five percent of the respondents:

Why Are You Taking Classes at PGCC?	
Prepare for transfer to a four-year college	42%
Prepare for a career or job change	22
Prepare for first job or career	11
Update skills for current job/qualify for promotion	11
Explore options, decide what I want to do	8
Help me start or manage my own business	3
Learn for its own sake, know more about the world	2
Learn more about a hobby or personal interest	1
Family/friends expected me to attend college	<1

The typical graduate takes more than four years to earn a "two-year" Associate degree. Most students who transfer will do so before earning a degree from PGCC. How long do entering students anticipate going to the community college? Slightly over half said they planned to attend PGCC for two years. Over a fifth expected to be at the college longer. The rest anticipated shorter stays, including 7 percent who expected to attend only one term:

How Long Do You Plan to Attend PGCC?	
Two years (through Spring 1994)	53%
Three to four years	20
One year (through Spring 1993)	17
One semester (Fall 1992 only)	7
Five years or more	3

Students are asked to identify the curriculum they plan to study at the college on their application. The college uses this identified major field in enrollment analyses and reporting to the state. How sure of their choices are new students just beginning their college careers? Sixty-five percent of the respondents indicated that they were definitely committed or at least fairly sure of their curriculum choice. Over a quarter, however, expressed less certainty about their choice or stated that they were undecided:

How Sure Are You of Your Choice of Major?	
Definitely committed to my PGCC program choice	34%
Fairly sure it's the right field for me	31
I am undecided about/have not chosen a curriculum	15
Unsure of my choice, likely to change my mind	12
Taking courses only/not interested in a degree program	8

Current Socio-economic Status

At the time of the survey, slightly over half of the students lived with one or both of their parents. A fifth lived with their spouse, with or without children. Approximately one in 15 students either lived alone, with one or more children but with no spouse or partner at home, or with unrelated housemates. Nine percent had other household arrangements, such as living with relatives other than their parents, spouses, or children:

Which Statement Describes Your Living Arrangement Now?	
I live with both parents	32%
I live with one parent	21
I live with my spouse (with or without children)	19
I live alone	7
I live with my child(ren)--no spouse/partner present	6
I live with person(s) not related to me	.6
Other	9

Twenty-seven percent of the respondents had children under their care. Half of these were responsible for one child, a third had two children, with the remainder caring for three or more.

Forty-five percent of the respondents were employed full-time when surveyed. Twenty-eight percent held part-time jobs. Fully a fifth were unemployed and seeking a job:

What Is Your Current Employment Status?	
Employed full-time (30 or more hours per week)	45%
Employed 10 to 29 hours per week	26
Unemployed but seeking a job	20
Unemployed, not seeking a job (includes homemaker, retired)	7
Employed less than 10 hours per week	2

Half of the respondents reported household incomes below $40,000, compared to a Prince George's County median of $43,000. The reported incomes encompassed a wide range, with five percent claiming incomes below $5,000 annually and three percent claiming incomes of at least $100,000. A majority fell into the middle income categories, with annual household incomes between $30,000 and $75,000. The most affluent respondents were those living with both natural parents. The least affluent were those living with their children with no spouse or partner present, those living with person(s) not related to them, and those living alone.

Academic Background

About one fourth of the students who graduate from Prince George's County public high schools will attend PGCC within ten years of their graduation. The college is the most popular entry point into higher education for county residents. Yet nearly half of the respondents were not county high school graduates, and fully 62 percent had attended other school systems in grades K-8:

Where Did You Go to Elementary and High School?		
	Grade K-8	High School
Prince George's County public schools	38%	51%
Other public schools (non PG/DC)	25	23
Private schools	16	11
Washington, D.C. public schools	9	7
Combination/other schooling	12	7

Half of the respondents reported spending three hours or less a week on homework when they were in high school. Four percent claimed to study more than 15 hours a week. Students from private high schools reported spending more time on homework than those who had attended public schools. Forty percent of the private school graduates reported spending at least 7 hours a week on homework, compared to less than 16 percent of the Prince George's County public high school graduates.

How Much Time Did You Spend on Homework Each Week?	
None	2%
1 hour or less (per week)	14
2 to 3 hours	35
4 to 6 hours	28
7 to 15 hours	18
More than 15 hours	4

Most respondents reported getting B's and C's in high school. Thirty percent claimed to have been A and B students in high school. Only seven percent admitted to receiving mostly C's and D's or lower:

What Grades Did You Get in High School?	
Mostly A's	5%
A's and B's	25
Mostly B's	16
B's and C's	35
Mostly C's	13
C's and D's	6
Mostly D's or lower	1

Recent national studies have suggested that mathematics achievement in high school is a significant predictor of college attendance and success. Placement test results at the college indicate that mathematics is the skill area entering students are most likely to be deficient in. For example, three-fifths of the Fall 1992 entrants tested in mathematics earned scores indicating a need for developmental mathematics. Demographic groups most in need of remedial mathematics included African Americans (71 percent needing) and women (65 percent). Students of all ages were found to need mathematics assistance; indeed, the need increased with age. In some cases, the skill deficit was severe. In recent years, as many as a fourth of those needing developmental mathematics have been placed in basic arithmetic. Less than one in seven of the students identified as needing remedial mathematics complete the appropriate developmental math courses within five years of entry to PGCC.

Analyses of course pass rates at the college reflect the relatively poor mathematics abilities of PGCC students. Courses in developmental math and credit math consistently have among the lowest pass rates on campus.

The survey asked respondents to indicate the mathematics courses they had passed in high school. A fifth had not completed a single algebra course. Seventeen percent had completed only one year of algebra. Only four out of five entrants to the college had completed at least one year of algebra, and only half had had two years of algebra. At the opposite extreme, 11 percent had had some calculus.

What is the Highest Math Course You Passed in High School?	
General mathematics	11%
Consumer mathematics	1
Business mathematics	8
Algebra I	17
Geometry	14
Algebra II	22
Trigonometry	16
Pre-calculus/elementary analysis	8
Calculus	3

A final indicator of academic background included in the survey was an associational one. Students were asked what proportion of their friends went to college immediately after high school. Less than a third of the respondents reported that all or almost all of their friends had gone to college. Nearly half of the respondents indicated that less than half had done so. Fifteen percent said that few or none of their friends had gone to college:

What Proportion of Friends Went Directly to College?	
None/few	15%
Some, but less than half	32
One half or more	25
All/almost all	28

Socio-cultural Background

The survey included a number of questions concerning the students' lives while they were growing up. The purpose of these items was to gain a greater understanding of who our students were, and, in later studies, to explore whether these background characteristics were related to student achievement at the college.

English was the first language learned by 88 percent of the respondents. Nearly four percent were raised in Spanish-speaking homes. The remaining eight percent first learned to speak a language other than English or Spanish. Thirty-eight other languages were identified. Fourteen respondents specified native African languages, such as Amharic and Yoruba. Twelve cited Tagalog or other Filipino languages. French was the first language of 11 respondents. Indian languages such as Gujarati were the native languages of eight respondents. Other languages cited by multiple respondents included Korean, Chinese, Urdu, Italian, and Vietnamese.

Three-fifths of the respondents lived with both natural parents when they were growing up. Thirty percent lived with one parent.

What Were Your Living Arrangements Growing Up?	
I lived with both natural parents	61%
I lived with one of my parents	30
I lived with other relatives (aunt, grandparents, etc.)	5
I lived with foster parent(s)/guardian(s)	1
Other	3

Majorities of both the mothers and the fathers of the respondents had never attended college. Indeed, for two-fifths of the respondents, neither parent had attended college. Thus two in five were first-generation college students. At the opposite extreme, 15 percent of the respondents had at least one parent with a graduate or professional degree.

What is the Highest Education Your Parents Attained?		
	Mother	Father
Less than high school diploma	16%	20%
High school graduate	39	34
Some college attendance	21	18
Two-year college degree	8	6
Four-year college degree	9	10
Graduate or professional degree	8	13

Respondents were asked to indicate the occupations of their mother and father. Respondents reported a wide range of jobs for both mothers and fathers:

What Type of Work Do Your Mother and Father Do?		
	Mother	Father
Executive/administrative/managerial	8%	12%
Professional specialty occupations	4	11
Service worker	11	7
Mid-level government worker	7	6
Machinist/mechanic	2	6
Small business owner	2	6
Carpenter/electrician/plumber/HVAC	<1	6
Construction worker/laborer	<1	6
Truck/bus/taxi driver	0	6
Military service	<1	5
Administrative support/clerical	10	4
Technicians, including health	4	3
Cashier/salesperson	5	2
Schoolteacher/admin./counselor	5	2
Farmers/forestry worker	1	2
Homemaker (full-time)	13	<1
Secretary/administrative assistant	10	<1
Nurse	8	<1
Other blue collar occupations	5	6
Other white collar occupations	2	3

Among the professional specialty occupations, engineers and computer analysts were most prevalent. Custodians, janitors, child care workers, security guards, and food

service workers were most common among the service occupations. Engineering technicians, drafters, and radiographers were the most often cited technician-level occupations. Thirteen percent of the respondents reported that their mothers were full-time homemakers.

To add to the college's knowledge of student backgrounds, the survey included a series of behavioral questions relating to the respondents' lives while they were growing up. Respondents were asked to indicate whether a statement was very true, somewhat true, or not true about them when they were growing up.

How True Was Each Statement About You?			
	Very True	Somewhat True	Not True
I had regular chores to do	67%	26%	8%
My parents made sure I did homework	59	34	7
I had a quiet place to study at home	39	48	14
My home was filled with books	38	48	14
I could watch as much TV as I wanted	27	40	33
I was read to a lot as a child	26	46	28
Good time more important than grades	20	44	36
Family never expected me to go to college	10	21	69
I could stay out as late as I wanted	8	22	70

All of these family and home characteristics were related, at least moderately, and in the expected way, to the respondents' self-reported high school grades. For example, respondents indicating their home was filled with books and that they were read to a lot as a child reported better grades in high school than those from less literary homes. Similarly, respondents who said that their television viewing was restricted and who had a quiet place to study also claimed higher grades in school.

Market Share Analysis

What proportion of Prince George's County residents attending college in Maryland attend Prince George's Community College? Analyses by MHEC based on student enrollment files submitted by each institution provide answers to such questions. In fall 1994, 44 percent of the residents of Prince George's County attending a Maryland college or university as an undergraduate attended PGCC. The college's undergraduate market share had declined slightly from prior years. Higher proportions of the residents of Anne Arundel, Baltimore, and Montgomery counties were enrolled at local community colleges. For example, 55 percent of the residents of Baltimore County attending a state college in fall 1994 were enrolled at Catonsville, Dundalk, or Essex community college. Anne Arundel Community College had the largest market share of county undergraduates among the four counties reviewed:

Share of County Residents Enrolled as Undergraduates at a Maryland College or University Attending County Community College, Fall 1990-94

County	1990	1991	1992	1993	1994
Prince George's	45.4	45.4	45.9	45.5	44.1
Anne Arundel	59.7	59.6	58.6	59.6	58.8
Baltimore	55.8	56.7	55.8	55.6	55.2
Montgomery	56.8	57.7	57.6	57.9	57.7

Prince George's Community College enrolled 35 percent of the Prince George's County residents entering a Maryland college or university as a first-time, full-time freshmen in fall 1994. This was down nearly five percentage points from the prior fall. The community college share of first-time, full-time freshmen was down at the other three counties, but the decline was less severe and the community college share notably larger. For example, Anne Arundel Community College enrolled 57 percent of the new full-time freshmen in fall 1994, down from 60 percent in fall 1993.

Share of County Residents Enrolled as First-time Full-time Freshmen at a Maryland College or University Attending County Community College, Fall 1990-94					
County	1990	1991	1992	1993	1994
Prince George's	43.2	41.0	39.9	40.3	35.4
Anne Arundel	60.2	61.2	58.2	60.3	57.2
Baltimore	50.7	51.7	50.7	49.3	49.1
Montgomery	52.7	56.1	52.4	52.9	50.6

The college's market share among all full-time undergraduates attending a Maryland college or university in fall 1994 was 24 percent. Community colleges in the other three jurisdictions had full-time student market shares at least 10 percentage points higher.

Share of County Residents Enrolled as Full-time Undergraduates at a Maryland College or University Attending County Community College, Fall 1990-94					
County	1990	1991	1992	1993	1994
Prince George's	26.6	25.7	25.6	25.9	23.9
Anne Arundel	39.4	38.7	38.7	37.9	36.8
Baltimore	34.5	35.7	36.3	37.1	36.0
Montgomery	35.8	35.0	35.9	35.7	34.8

Three of every five Prince George's County residents attending a Maryland college or university part-time in fall 1994 attended PGCC. The college's share of the part-time undergraduate market has been relatively stable. Over two-thirds of the residents of Anne Arundel, Baltimore, and Montgomery counties attending Maryland schools as part-time undergraduates attended community colleges in their county of residence.

Share of County Residents Enrolled as Part-time Undergraduates at a Maryland College or University Attending County Community College, Fall 1990-94					
County	1990	1991	1992	1993	1994
Prince George's	59.9	60.2	60.9	60.0	59.7
Anne Arundel	74.5	74.8	73.4	74.7	74.2
Baltimore	69.8	70.5	68.7	68.3	68.4
Montgomery	73.4	74.6	74.4	75.2	76.1

The Competition

More Prince George's County residents attend PGCC than any other institution of higher education. While the college's share of the total county undergraduate market is less than the comparable shares of community colleges in some other jurisdictions, PGCC is nevertheless the number one choice of county residents. In fall 1994, a total of 11,547 (or 44 percent) of the 26,174 county residents attending a Maryland college attended PGCC. The second most popular institution, the University of Maryland at College Park (UMCP), enrolled 4,182 residents of Prince George's County. Thus PGCC enrolled over two and a half times as many county residents as the second most popular institution. (If a resident was enrolled at several institutions simultaneously, MHEC randomly assigned the resident to one of the institutions. As a result, MHEC enrollment figures do not match official third-week reports.)

Four institutions enrolled 80 percent of the Prince George's County residents attending a Maryland college as undergraduates: PGCC, UMCP, University of Maryland University College (UMUC), and Bowie State University. Of the four, only Bowie State enrolled more Prince George's County residents in 1994 than in 1990. Enrollment of county residents at Bowie State has increased nearly 30 percent since 1990. Other institutions with larger enrollments of Prince George's County residents over the 1990-94 period included Morgan State University (up 64 percent) and the University of Maryland Eastern Shore (up 28 percent).

Ten Maryland Colleges and Universities Enrolling the Most Undergraduates from Prince George's County, Fall 1990-94					
	1990	1991	1992	1993	1994
PGCC	12,528	12,692	12,595	12,187	11,547
UMCP	5,009	4,918	4,451	4,252	4,182
UMUC	3,763	3,621	3,445	3,202	3,152
Bowie State	1,610	1,648	1,877	2,087	2,085
UMBC	621	682	678	668	635
Montgomery College	589	685	647	637	623
Morgan State	365	415	484	539	599
Towson State	606	618	602	571	558
UMES	385	451	411	414	492
Frostburg State	357	349	348	378	343
All others	1,790	1,864	1,896	1,847	1,958
TOTAL	27,623	27,943	27,434	26,782	26,174

Attendance of Prince George's County residents at Maryland institutions of higher education varied according to student course loads. The University of Maryland at College Park enrolled the most full-time students from the county in fall 1994. However, among first-time, full-time freshmen, PGCC was most popular--enrolling 944 residents compared to 527 for UMCP. For part-time students, University College was second only to PGCC. Together, PGCC and UMUC enrolled four of every five Prince George's County residents attending a Maryland college as part-time undergraduates.

In-state competition for new full-time freshmen from Prince George's County currently involves primarily five institutions: PGCC, UMCP, Bowie State University, University of Maryland Eastern Shore, and Morgan State University. Competition for part-time undergraduates from the county centers on PGCC and UMUC.

Undergraduate Status of Prince George's County Residents Attending Maryland Colleges and Universities, Fall 1994				
	New FT Freshmen	Total Full-Time	Total Part-time	Total Students
PGCC	944	2,727	8,820	11,547
UMCP	527	3,345	837	4,182
UMUC	8	257	2,895	3,152
Bowie State	217	1,353	732	2,085
UMBC	70	516	119	635
Montgomery College	83	175	448	623
Morgan State	146	555	44	599
Towson State	93	509	49	558
UMES	181	477	15	492
Frostburg State	68	335	8	343
All others	332	1,162	796	1,958
TOTAL	2,669	11,411	14,763	26,174

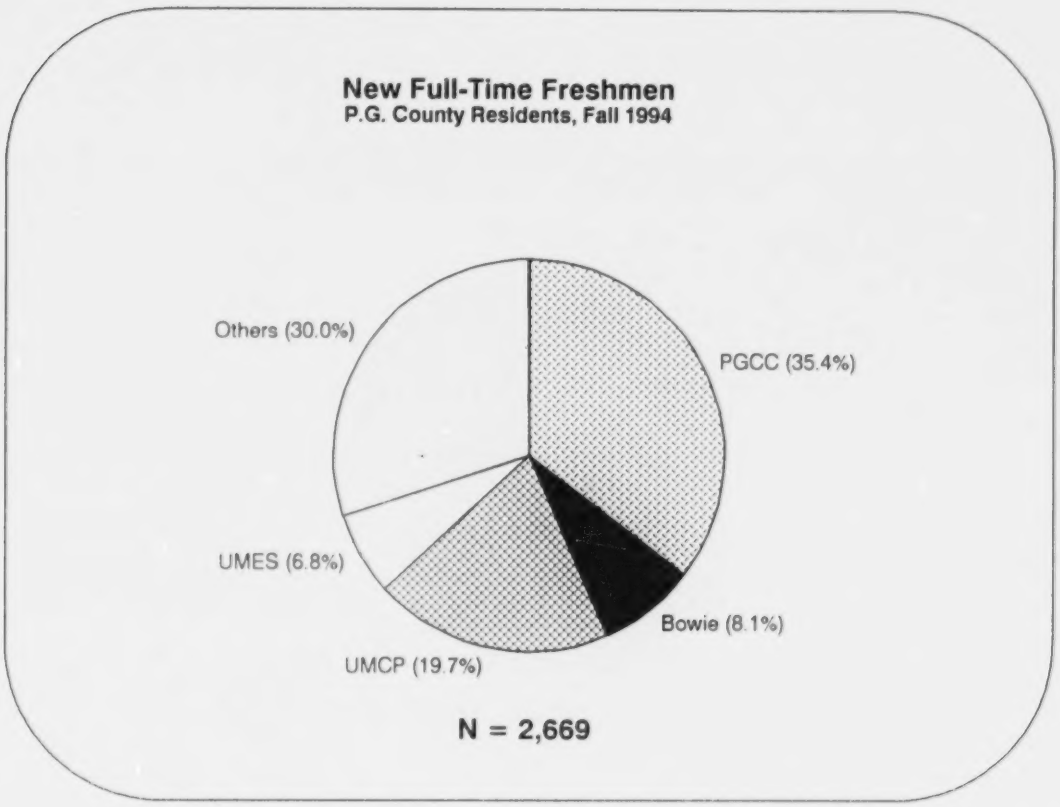
In summary, analysis based on fall 1994 market shares, the most recent information available, revealed the following:

- The college's market shares of new full-time freshmen and of all full-time undergraduates in fall 1994 were the lowest in recent history.

- The drop in new full-time market share (nearly 5 percentage points) between 1993 and 1994 was the largest decline on record.

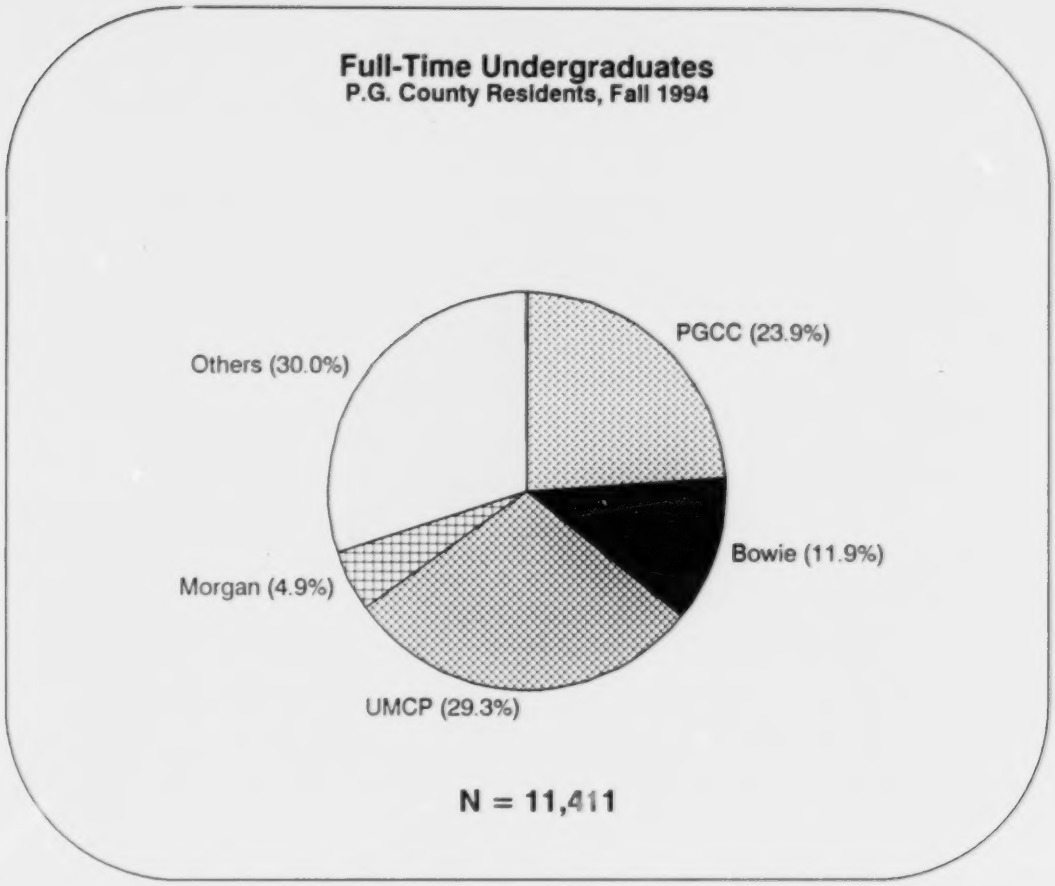
- The decline in market share of all full-time undergraduates (2 percentage points) was the largest in 9 years.

The displays on the next three pages show six-year trends in competitive market shares for first-time full-time, full-time, and part-time undergraduates residing in Prince George's County.



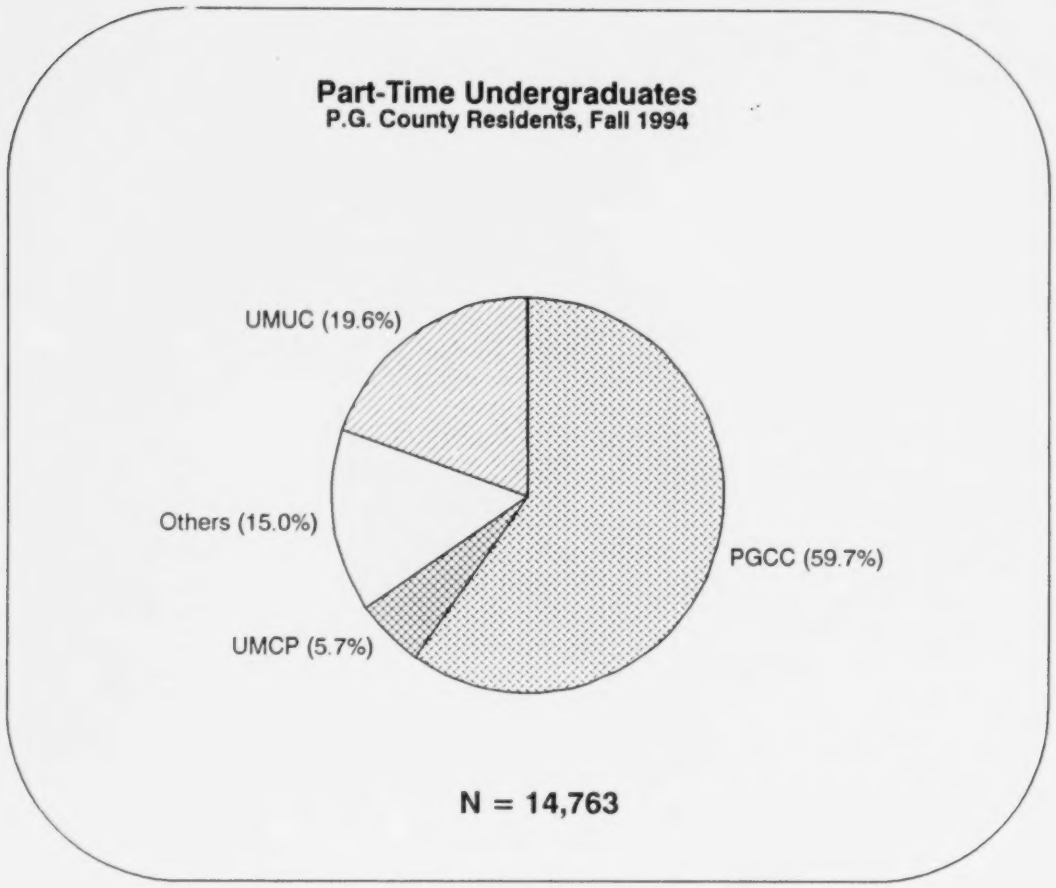
New Full-Time Freshmen

	1989	1990	1991	1992	1993	1994
Number of county residents enrolling as full-time freshmen at in-state colleges or universities	2,843	2,679	2,565	2,637	2,547	2,669
Percent enrolling at PGCC	40.5	43.2	41.0	39.9	40.3	35.4
Percent enrolling at major competitors:						
UMCP	20.2	18.0	17.9	19.7	17.9	19.7
Bowie State	8.3	8.7	6.2	9.4	8.5	8.1
UMES	4.1	4.6	5.1	2.9	4.4	6.8
Morgan State	3.1	2.3	4.7	6.1	5.1	5.5
Towson State	3.3	4.0	4.1	3.0	2.5	3.5
Montgomery	3.4	2.8	3.8	3.1	3.4	3.1
UMBC	3.8	3.6	4.6	2.5	3.4	2.6
Frostburg State	3.2	4.1	2.9	3.3	4.0	2.5



Full-Time Undergraduates

	1989	1990	1991	1992	1993	1994
Number of county residents enrolling as full-time students at in-state colleges or universities	11,995	12,060	11,943	11,665	11,396	11,411
Percent enrolling at PGCC	26.4	26.6	25.7	25.6	25.9	23.9
Percent enrolling at major competitors:						
UMCP	34.8	32.5	31.5	29.7	28.3	29.3
Bowie State	7.6	9.2	9.3	10.9	11.7	11.9
Morgan State	2.8	2.8	3.2	3.9	4.4	4.9
Towson State	4.5	4.7	4.8	4.7	4.6	4.5
UMBC	4.1	4.3	4.9	4.8	4.7	4.5
UMES	2.8	3.2	3.7	3.5	3.6	4.2



Part-Time Undergraduates

	1989	1990	1991	1992	1993	1994
Number of county residents enrolling as part-time students at in-state colleges or universities	16,095	15,563	16,000	15,769	15,386	14,763
Percent enrolling at PGCC	59.4	59.9	60.2	60.9	60.0	59.7
Percent enrolling at major competitors:						
UMUC	22.1	21.8	20.6	20.0	19.2	19.6
UMCP	7.2	7.0	7.2	6.2	6.7	5.7
Bowie State	2.8	3.2	3.4	3.8	4.9	5.0
Montgomery	3.0	2.7	3.0	3.0	3.0	3.0

Tuition and Fee Comparisons

How do fall 1995 tuition and required fees compare among PGCC, UMCP, and Bowie State University? To find out, PGCC costs were calculated for county residents under the $15 and $25 Instructional Services Fee rates. In addition, PGCC costs included a $1 per credit hour student activity fee and a $20 registration fee. For Bowie and UMCP, total cost was based on state residents in undergraduate programs. Room and board were excluded.

Tuition and Mandatory Fees, Fall 1995
PGCC, Bowie, and UMCP

Credit Hour Load	PGCC @ $15 ISF	PGCC @ $25 ISF	Bowie Total Cost	UMCP Total Cost	Bowie-PGCC Difference @ $15 ISF	UMCP-PGCC Difference @ $15 ISF
3	275	305	389	614	$114	$339
6	530	590	692	1,094	162	564
9	785	875	995	1,574	210	789
12	1,040	1,160	1,510	1,897	470	857
15	1,295	1,445	1,510	1,897	215	602

For all credit hour loads, PGCC is less expensive than Bowie, and Bowie is less expensive than UMCP. However, the differences for full-time study, particularly PGCC compared to Bowie, are not great. While a three-credit class would cost $84 to $114 more at Bowie than at PGCC, 15 credits would cost only $65 to $215 more. The full-time tuition rate at the university (making credits above 12 essentially "free") narrows the cost differential.

Why Do Some Applicants Not Enroll?

A key marketing question is why people who consider PGCC for postsecondary education fail to act on that inclination. The Office of Institutional Research and Analysis conducted a telephone survey during December 1994 to address this question. A total of 3,561 county residents applied for fall 1994 admission to Prince George's Community College. Under the college's open door admissions policy, all were accepted. A total of 1,879, or 53 percent, enrolled at the college in fall 1994.

The research office was asked by the Marketing Council to investigate why students who had expressed and acted on an interest in attending PGCC did not subsequently enroll for classes.

One hypothesis was that PGCC was a back-up choice for students who were applying and hoping to attend college elsewhere. Yet only one-fifth of the PGCC applicants had enrolled at other colleges in fall 1994. Bowie State University was the most popular:

College Attendance in Fall 1994
of PGCC Applicants Who Did Not Enroll at PGCC

College or University	Total
Bowie State University	13
University of Maryland at College Park	8
Montgomery College	5
Strayer College	4
University of the District of Columbia	4
Lincoln Technical Institute	3
Coppin State College	2
Frostburg State University	2
Morgan State University	2
Mount Vernon College	2
Towson State University	2
Other colleges	32
Total enrolled in college	79
Not attending college	295
Total respondents (including informants)	374

Thus, four out of five people who had applied to attend PGCC in fall 1994 did not attend college anywhere that term.

Applicants who were reached by phone were asked "What was the main reason why you didn't enroll at Prince George's Community College this fall?" Lack of

adequate personal finances was most frequently mentioned, cited by a third of the respondents. Another 12 percent indicated failure to secure financial aid. Thus 45 percent, or nearly half, of the respondents identified financial obstacles to their enrollment at PGCC. Thirteen percent of the applicants contacted said that they preferred to attend another college or university. Employment demands, transportation problems, child care responsibilities, and personal health problems were among the other reasons cited:

Reasons for Not Enrolling at PGCC Fall 1994 Applicants Phone Survey Respondents (N = 184)	
Reason for Not Enrolling at PGCC	Percent of Respondents
Didn't have the money/couldn't afford it	33%
Preferred to go to another college	13%
Applied too late/couldn't get financial aid	12%
Conflict with work schedule	6%
Transportation difficulties	6%
Child care responsibilities	5%
Personal emergency/health reasons	5%
Placement test	4%
Couldn't get desired courses	4%
Missed registration deadline	3%
Joined military service	2%

The telephone interviewers conducting the survey transcribed applicant comments as accurately as possible. Representative applicant comments are presented below, grouped within reason categories mentioned by at least five percent of the respondents.

Didn't Have the Money/Couldn't Afford It

The most prevalent reason given by applicants to PGCC who did not enroll at the college was that they didn't have the money or couldn't afford it. A third of the

respondents to the phone survey indicated some reason related to their personal financial situation or to the college's costs. Sample comments included the following:

> *Money. I can't afford to pay a $300 truck payment, a $700 rent payment, and go to school at the same time.*
>
> *They gave me only two weeks to get my money together. I didn't have the money.*
>
> *Money. My clutch went out. It was $500. That was my tuition money.*
>
> *The cost of three courses was too high. So I went to another college where the cost of three courses was less.*
>
> *I have a son who's a senior in high school. His senior expenses have blown us out of the water. I've put my plans on hold until he's done. It will be at least a year. He's going to Lincoln Technical Institute next year.*
>
> *Because I had to have the money in too soon.*
>
> *Because I didn't get my finances in order. I didn't want financial aid. I wanted to pay for it.*

Preferred to Attend Another College

The second most frequent reason given for not attending PGCC in fall 1994 was that the applicant had chosen to attend another college or university. Thirteen percent of the applicants gave this answer. In most cases, it was clear that PGCC was a back-up option in case an applicant didn't get into his or her preferred college. In some cases, scholarship offers by other colleges were crucial to student decisions to attend college elsewhere. The following quotes were in response to the question, "Why did you decide to attend _____ rather than Prince George's Community College?"

> *Because I wanted to go to a place where I didn't know anybody, so that I could get a fresh start.*
>
> *I was accepted at a four-year school, and they gave me money.*
>
> *Peer pressure. I didn't want people talking behind my back.*
>
> *Because my job was paying for classes at Catonsville.*

Because Mount Vernon College offered me money.

I want a bachelor of science in nursing and PGCC doesn't offer it.

I wanted to go to a university.

Because I live with my aunt during the week and her house is closer to Howard Community College.

Because I got accepted into the limited acceptance program in journalism at College Park. To stay in the program, I have to maintain a 2.0. To transfer in from PGCC, I would have to maintain a 2.8. A PGCC counselor recommended I go to UMCP.

I don't have to take any developmental courses at Strayer, and the staff there were very polite.

Because my father wanted me to attend a college where I wouldn't have to transfer after two years.

Because College Park has a very good computer science program.

I went to Computer Learning Center because I want to get a job as soon as possible.

My mother thought I'd be more comfortable at St. Mary's, and I thought I could talk to my teachers more.

I was on the waiting list for nursing. I didn't have to wait at Liberty University.

Applied Too Late/Couldn't Get Financial Aid

One in eight applicants said they didn't enroll at PGCC in fall 1994 because they didn't obtain financial aid. In most cases, this reflected applying too late or problems in processing, rather than being rejected. Sample comments:

My financial aid packet had not come back.

I didn't have any money. I was going to pay for it, but then I applied for a loan. But I asked one of the ladies in the financial aid office for help, and I didn't get any. They wanted to ask about my parents and stuff on the forms. My parents aren't applying to college.

I was looking to get some financial aid, and I didn't get any.

When I turned in my financial aid information, there was a problem with my social security number. I need to get it fixed with the Social Security Administration.

Because I didn't turn in my financial aid form.

I had to get my financial aid papers together. I hope to come in 1995. It takes so long to qualify for financial aid.

I was applying for financial aid and I didn't get my tax papers. My tax lady has all my paperwork.

I kept going up there, and they kept telling me different stuff. I'm getting my financial papers in for spring. I have to mail in one more form. I didn't know I had to mail stuff in. My sister said I could just bring the papers in.

I didn't hear anything or receive anything from financial aid or the admissions office.

Conflict with Work Schedule

Six percent of the respondents indicated that employment demands, usually a conflict between work hours and class schedules, prohibited their attendance at PGCC in fall 1994:

I couldn't get out of my work schedule. I work day and night.

Because I started working. It required me to work mornings and some evenings.

Transportation Difficulties

Six percent of the applicants indicated that problems getting to campus dissuaded them from enrolling. Lengthy trips on public transportation were typical:

I was going to be coming by bus every morning. It was too much complication.

I'm live in Fort Washington and it's difficult to get over there every day.

Child Care Responsibilities

One of every 20 respondents said that the responsibility of caring for children precluded their college attendance in fall 1994:

I work full time and have a child to take care of.

Because of my son. I thought my daughter would be able to watch him at night. She wasn't.

I just had a baby! I have to take care of my baby.

My babysitter didn't come through.

Because I have two small children and it's difficult for me to go out of the house to attend class. So I am taking a correspondence course with Empire State College.

Personal Emergency/Health Reasons

Five percent of the applicants cited unanticipated personal reasons, such as ill health or pregnancy, as explanations for not enrolling at PGCC in fall 1994:

I am pregnant right now.

Because my son came late. He was born in August.

I found out I was pregnant, and I thought it would be too much.

I had some personal things come up that I had to deal with.

I just learned I was pregnant. I plan to attend next fall.

Attend PGCC in the Future?

The non-enrolling applicants were asked if they thought they might attend PGCC in the future. Over two-thirds (69 percent) indicated they thought they would. Ten percent said no, with the remaining 21 percent not sure.

The High School Student Market

PGCC's credit student market can be divided into three segments: current students, new students direct from high school, and community adults--including people entering college for the first time two or more years after high school, students entering PGCC for the first time but who have attended college elsewhere previously, and students being readmitted to PGCC after an interruption in studies. These three segments represent separate target markets for college promotional campaigns. This section provides baseline data for the high school market.

Fall Enrollment of Students Direct from High School

Half of the first-time college students entering PGCC each fall graduated from high school the prior spring or summer. Four-fifths of these entrants direct from high school are graduates of Prince George's County public high schools. In fall 1995, a total of 1,266 people who received high school diplomas in 1995 enrolled at PGCC. Eighty percent, or 1,018, had graduated from a public school in Prince George's County. The number of county public high school graduates entering PGCC was up six percent from fall 1994. The number of graduates from private schools in the county entering PGCC has declined steadily during the 1990s:

Fall Enrollment of Current-year High School Graduates
High School Graduates Entering PGCC each Fall

Fall	Total	P.G. Public	P.G. Private	Non-P.G. Schools	G.E.D.
1995	1,266	1,018	82	141	25
1994	1,210	958	98	119	35
1993	1,307	1,033	101	146	27
1992	1,342	1,052	124	130	36
1991	1,349	1,022	130	151	46
1990	1,462	1,145	147	134	36

Where do County High School Graduates Go to College?

Prince George's Community College enrolls more county high school graduates than any other higher education institution. More county high school graduates attend PGCC than attend all four-year colleges and universities in Maryland combined. The most recent data available, provided by the High School Graduate System (HGS) portion of the Maryland Higher Education Commission's Student Outcome and Achievement Report (SOAR), reports on the Maryland college attendance during 1993-94 of students graduating from high school in 1993.

A total of 2,592 graduates of Prince George's County schools attended a college or university in Maryland at some time during the 1993-94 academic year. This represents 42 percent of the total graduates for that year. The remaining 58 percent either attended a college outside of Maryland or did not attend college at all.

Half of all the students attending college in Maryland--or about 21 percent of all county high school graduates from 1993--enrolled at Prince George's Community College in fall 1993, spring 1994, or FY94 summer sessions. Sixteen percent of the graduates enrolled at Maryland four-year public institutions. Less than one percent attended an independent college or university in Maryland.

College Attendance of County High School Graduates of 1993
College Enrollment during 1993-94 Academic Year

Institution/Segment	Number	Percent
Prince George's Comm. College	1,307	21%
Maryland public four-year	990	16%
Other Maryland community college	247	4%
Maryland independent college	48	<1%
Total in college in Maryland	2,592	42%
Not in college/attending out of state	3,625	58%
Total County high school graduates	6,217	100%

The percentages in the above table reflect the proportion of the total 6,217 graduates attending each type of institution. An alternative calculation reports the percentage of graduates enrolled in a Maryland college or university that attends

institutions in each segment. Of the 2,592 graduates attending a Maryland college, three-fifths were enrolled in a Maryland community college, mostly at PGCC. Campuses of the University of Maryland system enrolled another third. Two percent of the Maryland college-going graduates enrolled at private institutions. Five percent chose Morgan State University. The five most popular institutions were (with percent *of those attending a Maryland college*):

Enrollment of County High School Graduates of 1993 Percent of Graduates Attending Maryland Colleges or Universities in 1993-94		
College or University	Number	Percent
Prince George's Community College	1,307	50%
Univ. of MD at College Park	350	14%
Bowie State University	160	6%
Montgomery College	155	6%
Morgan State University	134	5%
All others	486	19%
Total attending Maryland colleges	2,592	100%

College and university attendance differed somewhat by student race or ethnicity. While similar proportions of African-American and white students attended community colleges (60 and 62 percent, respectively), fully a fourth of the white county graduates enrolled at a Maryland community college other than PGCC--compared to less than ten percent of the African Americans. Sixty-two, or 87 percent, of the 71 Prince George's County high school graduates choosing Anne Arundel, Charles, or Howard community colleges instead of PGCC were white. Seven in ten Hispanic graduates were enrolled at a community college, a third at Montgomery College.

Nearly half of the Asian graduates of county high schools enrolled at campuses of the University of Maryland, with the College Park campus most popular. A third of the white students, and 30 percent of the African Americans, attended UMS schools. All but ten of the over 400 county high school graduates enrolled at Bowie State University, Coppin State College, Morgan State University, and the University of Maryland Eastern Shore, were African Americans.

Maryland College and University Attendance of 1993 Graduates of Prince George's County High Schools

Attending College during 1993-94 Academic Year, by Race

Institution	Asian	Black	Hispanic	White
Prince George's CC	73	879	28	296
Montgomery College	22	77	16	29
Howard CC	2	2	2	24
Charles County CC	0	2	1	19
Anne Arundel CC	0	0	0	19
All other MD CCs	2	11	0	5
Total community college enrollees	99	971	47	392
UM-College Park	78	123	16	121
Bowie State University	2	151	1	5
UM-Eastern Shore	1	90	0	0
UM-Baltimore County	12	36	0	27
Frostburg State Univ.	3	37	2	30
Salisbury State Univ.	1	11	0	15
Towson State Univ.	2	31	0	14
Coppin State College	0	17	0	0
Total University of Maryland system	99	496	19	212
Morgan State Univ.	1	132	0	0
St. Mary's College	1	6	0	8
Capitol College	0	10	0	2
All other independents	1	14	1	18
TOTALS	201	1,629	67	632

SOURCE: MHEC Student Outcome and Achievement Report (SOAR) high school graduate system, March 1995. Table excludes 63 Native American and "other race" graduates attending Maryland colleges and universities.

The tables below show the number and percent of graduates from each county high school enrolling at PGCC each fall. Schools providing the most entrants to PGCC in recent years have been Largo, Eleanor Roosevelt, Bowie, Suitland, and Oxon Hill.

Fall Enrollment of County Public High School Graduates
Entering PGCC Fall Following High School Graduation

	1990	1991	1992	1993	1994	1995
Largo	92	80	104	92	82	105
Roosevelt	81	57	67	64	69	99
Bowie	117	77	100	82	74	72
Suitland	51	80	80	70	75	72
Oxon Hill	70	44	59	62	70	70
DuVal	64	51	38	55	51	54
Douglass	51	44	45	67	50	52
Northwestern	51	54	31	57	38	50
Crossland	78	71	74	69	58	49
High Point	59	65	39	43	39	48
Surrattsville	59	46	63	43	43	45
Parkdale	61	66	45	35	44	42
Gwynn Park	32	39	45	35	43	41
Friendly	85	67	49	57	46	37
Fairmont Hts.	31	28	38	29	24	36
Bladensburg	35	42	38	56	42	35
Laurel	35	23	28	30	20	34
Central	31	14	37	36	35	28
Potomac	36	46	36	30	27	25
Forestville	25	24	22	19	18	14
Evening H.S.	0	0	2	0	2	7
Croom Voc.	1	0	3	0	1	2
Tall Oaks Voc.	0	4	9	2	6	1
Cheltenham	0	0	0	0	1	0
Total	1,145	1,022	1,052	1,033	958	1,018

Fall Enrollment Rates of County Public High School Graduates
Entering PGCC Fall Following High School Graduation

	1994 Graduates			1995 Graduates		
	Total Grads	Entered PGCC	Percent	Total Grads	Entered PGCC	Percent
Largo	428	82	19.2%	457	105	23.0%
DuVal	246	51	20.7%	247	54	21.9%
Fairmont Heights	156	24	15.4%	171	36	21.1%
Surrattsville	214	43	20.1%	220	45	20.5%
Bowie	390	74	19.0%	401	72	18.0%
Oxon Hill	397	70	17.6%	402	70	17.4%
Douglass	317	50	15.8%	306	52	17.0%
Central	192	35	18.2%	167	28	16.8%
Parkdale	262	44	16.8%	256	42	16.4%
Bladensburg	253	42	16.6%	229	35	15.3%
Gwynn Park	291	43	14.8%	274	41	15.0%
Crossland	328	58	17.7%	331	49	14.8%
Roosevelt	596	69	11.6%	684	99	14.5%
Evening H.S.	46	2	4.3%	50	7	14.0%
Suitland	502	75	14.9%	526	72	13.7%
Friendly	283	46	16.3%	306	37	12.1%
Northwestern	359	38	10.6%	441	50	11.3%
Potomac	220	27	12.3%	227	25	11.0%
High Point	446	39	8.7%	447	48	10.7%
Forestville	123	18	14.6%	152	14	9.2%
Laurel	356	20	5.6%	383	34	8.9%
Croom Voc.	38	1	2.6%	51	2	3.9%
Tall Oaks Voc.	60	6	10.0%	60	1	1.7%
Cheltenham	8	1	12.5%	12	0	0.0%
Total	6,511	958	14.7%	6,800	1,018	15.0%

Remedial Needs of County High School Graduates

Two-thirds of the entering high school graduates in fall 1995 who completed the placement test battery in all three skill areas (reading, English composition, and mathematics) had test scores indicating a need for remediation in at least one area. A fourth of the tested students needed remediation in all three areas:

Remedial Needs of 1995 County High School Graduates Entering PGCC Tested in All Three Skill Areas		
Tested in all three areas	950	100%
No remediation needed	315	33%
Remediation needed	**635**	**67%**
In one area	229	24%
In two areas	173	18%
In three areas	233	25%

The proportion of students needing remediation in at least one area was 67 percent, down four percentage points from fall 1994:

Percent of High School Graduates Tested in All Three Skill Areas Needing Remediation in at Least One Area		
	Tested in All Three Skill Areas	Percent Needing Remediation
Fall 1995	950	67%
Fall 1994	886	71%
Fall 1993	945	68%
Fall 1992	926	68%
Fall 1991	908	66%
Fall 1990	1,037	57%

The percentage of entering high school graduates needing remediation in mathematics declined from 61 to 53 percent in fall 1995. The proportion of students needing developmental reading has been relatively stable over the past four years. The percentage of new graduates needing developmental English was up slightly from last year:

Percent of High School Grads Tested in Each Skill Area Needing Remediation, Fall 1992-1995				
	1992	1993	1994	1995
Mathematics	54% (957)	58% (976)	61% (901)	53% (989)
Reading	39% (944)	42% (952)	39% (899)	39% (966)
English	38% (941)	39% (959)	39% (896)	41% (963)

Even though the percentage needing remediation has declined, mathematics remains the skill area that county high school graduates are most deficient in.

Survey of County High School Seniors, 1993-94

To learn more about the college plans of county high school students, the college has gained the cooperation of the county school system to administer a survey during scheduled school visits. During the 1993-1994 school year, the college's director of recruitment administered surveys in all 20 county public high schools and in 3 private schools. A total of 4,428 high school seniors completed the survey.

Eighty-nine percent of the seniors said they planned to attend college soon after high school graduation. Among seniors who mentioned a college, ten percent indicated Bowie State University, 13 percent the University of Maryland at College Park, 34 percent Prince George's Community College, and 43 percent specified other institutions.

The respondents were asked "Will you need financial aid to attend college?" Eighty-eight percent of the seniors who planned to attend Prince George's Community College responded yes. For seniors planning to attend Bowie State University, the University of Maryland at College Park, or some other institution, the figures were 93 percent, 89 percent, and 88 percent, respectively.

The survey asked seniors to check career areas that interested them from a list of programs at Prince George's Community College. The five career areas that seniors chose most often were business management, computer programming/information systems, engineering, nursing/health technology, and accounting. Thirty percent indicated interest in career areas not currently served by PGCC programming.

Career Interests of County High School Seniors Office of Recruitment Survey, 1993-94		
Career Areas	Number of Interested Seniors	Percent of All Seniors
Business Management	1,028	23
Computer/Information Systems	746	17
Engineering	709	16
Nursing/Health Technology	651	15
Accounting	595	13
Criminal Justice	543	12
Science/Mathematics	402	9
Electronics Technology	354	8
Computer Service Technology	357	8
Marketing	354	8
Early Childhood Education	302	7
Art	279	6
Paralegal/Legal Assistant	270	6
Music	274	6
Teaching	258	6
Word Processing/Secretarial	217	5
Drafting/Computer-Aided Drafting	144	3
Landscaping/Horticulture	96	2
Space Technology	97	2
Other	1,338	30

Only half of the seniors were aware that Prince George's Community College offered courses of study in the listed career areas. Seventy percent of the students stated they were aware that the first two years of a four-year degree could be completed at Prince George's Community College, and that all credit hours from these years could be transferred with proper course selection.

The survey asked county high school seniors to rate Prince George's Community College in six categories, using a five-point scale: very good (5), good (4), fair (3), poor (2), and very poor (1). The average ratings in each category were 4.1 for cost, 4.0 for variety of courses, 3.9 for quality of teaching, 3.7 for co-curricular activities, 3.7 for PGCC as a place for "people like me", and 3.7 for overall reputation.

High School Student Ratings of PGCC
Office of Recruitment Survey, 1993-94

Category	Students Responding	Very Good (5)	Good (4)	Fair (3)	Poor (2)	Very Poor (1)	Scale Mean
Cost	3,833	39%	38%	22%	1%	<1%	4.1
Variety of Courses	3,793	25%	50%	23%	2%	1%	4.0
Quality of Teaching	3,746	14%	61%	24%	1%	1%	3.9
As a Place for People Like Me	3,817	21%	41%	28%	6%	4%	3.7
Co-Curricular Activities	3,668	12%	49%	33%	4%	1%	3.7
Overall Reputation	3,837	15%	47%	30%	5%	2%	3.7

Responses to these rating scales varied somewhat by race/ethnicity. Sixty-eight percent (or 2,955) of the seniors described themselves as African-American, 21 percent (or 911) as white, 6 percent (or 251) as Asian, 5 percent (or 202) as Hispanic/Latino, and 1 (or 34) percent as Native American/Indian. Two percent (or 75) of the seniors did not provide their racial/ethnic background. Across all racial/ethnic backgrounds, the highest average ratings were given to the cost of attending Prince George's Community College. African-American and Hispanic students gave PGCC higher average ratings than Asian or white students on all five remaining scales. The largest difference was in response to the assessment of PGCC "as a place for people like me." African-American students had an average rating of 3.8 on this scale, compared to 3.4 for white students.

Average Ratings of PGCC, by Race/Ethnicity Office of Recruitment Survey, 1993-94					
Category	Black	White	Asian	Hispanic	Native
Cost	4.1	4.3	4.1	4.1	4.0
Variety of Courses	4.0	3.8	3.7	4.1	4.0
Quality of Teaching	3.9	3.8	3.8	4.1	3.9
As a Place for People Like Me	3.8	3.4	3.4	4.0	3.4
Co-Curricular Activities	3.7	3.5	3.4	4.0	3.8
Overall Reputation	3.7	3.5	3.5	4.0	3.7

Nine in ten high school seniors planned to attend college soon after graduation. Over a third (34 percent) planned to attend PGCC. The University of Maryland at College Park was cited by another 13 percent. Bowie State University received the third most mentions, chosen by 10 percent of the respondents. Fully 43 percent (or 1,658 respondents) of the seniors who planned to attend college did not plan to attend Bowie State, PGCC, or UMCP. They identified 320 other institutions in their plans, a clear indication that colleges and universities nationally have a recruiting presence in Prince George's County. The ten most commonly cited institutions (other than PGCC, UMCP, or Bowie State) were Morgan State University, Hampton University, Towson State University, the University of Maryland Baltimore County, the University of Maryland Eastern Shore, Howard University, Montgomery College, North Carolina A and T, the University of the District of Columbia, and Salisbury State University. At the opposite end in popularity, 169 institutions were cited just once.

Colleges and Universities Cited by County High School Seniors In Addition to PGCC, University of Maryland College Park, and Bowie State Office of Recruitment Survey, 1993-94		
Institution	Number of Listings	Percent of College-bound Seniors
Morgan State University	174	4.5
Hampton University	128	3.3
Towson State University	111	2.9
University of Maryland Baltimore County	107	2.8
University of Maryland Eastern Shore	103	2.7
Howard University	97	2.5
Montgomery College	69	1.8
North Carolina A & T State University	59	1.5
University of the District of Columbia	50	1.3
Salisbury State University	46	1.2

Assessing the Adult Market for Higher Education in the County

During the spring of 1995, a committee of the college's Marketing Council, in conjunction with OIRA, designed a telephone survey of county adults to expand the college's knowledge of the community's perceptions of PGCC and the overall postsecondary education market. The college contracted with the Survey Research Center at the University of Maryland at College Park to conduct the phone interviews. Four hundred interviews were completed.

The Past Course-Taking Market

- About a quarter of the respondents reported having engaged in some form of postsecondary course-taking during 1993-1995.

- Corroborating MHEC published enrollment data, PGCC proved to be the favorite choice of survey respondents claiming postsecondary course-taking within the last two years; other survey findings, however, suggested that the college's market preeminence needed to be qualified in several important ways.

- PGCC was much more likely to be top choice of past *non-credit* course-taking respondents than among *credit* course-taking respondents.

- Looking at *number of past courses* taken by past students ("moving product") rather than *number of past enrollees* ("acquiring customers") as the basis for determining course provider market share, PGCC market position was drastically reduced, especially as compared with those of UMCP, Bowie State University and other Maryland public four-year institutions.

- Three in ten respondents in the past student subsample said that they already held bachelor's degrees. Students desiring further *degree-credit* study and graduate degrees would be unlikely candidates for community college enrollment.

- Almost two-fifths of the past course-taking respondents said that their studies took place at course providers *not tracked by MHEC* -- 20 percent at out-of-state four-year colleges and universities, and 18 percent at non-traditional higher educational agencies (proprietary schools, employer-based training classes and local government-sponsored continuing education programs). Collectively, the latter grouping proved to be PGCC's main competition for the continuing education dollar.

- There were as many past course-taking respondents who *considered PGCC* before choosing some other provider as there were claimed PGCC students. Although a numerical majority of "the ones that got away" ultimately selected four-year colleges and universities, a disproportionately large minority of them ended up with non-traditional course providers.

- A bit over half of the past student respondents said that they never even considered PGCC as a place to take classes; these firm rejecters concentrated in the four-year provider subsamples.

Provider Student Body Profiles

- The typical PGCC student recently has been non-white, age 30 or older, and married with children. He or she has been employed full-time and lives in a household with a low-middle annual income compared to the county average. Educationally, he or she did not go beyond a high school diploma. The PGCC student of the past showed equal likelihood to concentrate on credit or non-credit study, had mainly job-oriented educational objectives, and tended to take only a semester's worth of courses over a two-year period.

- The typical student who enrolled at a Maryland public four-year college or university was a single, minority person in his or her 20s from a home more affluent than the county average. He or she was about as likely to be a full-time student as to be employed full-time. Enrollment was almost always in a credit program and involved signing up for at least a year's worth of courses. Study was almost always aimed at obtaining a bachelor's or graduate degree, although job-related motives also were present.

- The typical past student at an independent Maryland or out-of-state college or university resembled the Maryland public four-year college student, except that he or she was much more likely to be white and to belong to a household even more affluent.

- The typical past student interviewed who chose a non-traditional course provider was, like the typical PGCC student, older, married, less affluent, employed full-time, job-oriented in his or her study objectives and likely to take only a few classes. Unlike the PGCC student, however, he or she did not typically come from a minority racial background.

Past Provider Choice Motivations

- When asked to explain their provider choice in their own words, past student respondents most often mentioned convenience of provider location and class scheduling (36 percent); the second most common reason was academic reputation or the quality of instruction and programs offered (21 percent). Only 12 percent gave tuition or cost explanations for provider selection, although another 8 percent mentioned a second financial reason behind their selection--the offer of a scholarship.

- the vast majority of past PGCC students in the sample tended to explain their provider selection in convenience of location and schedule terms;

both convenience and quality considerations, in about equal measure, seemed to underlie Maryland public college and non-traditional agency choice, while past students of private and out-of-state institutions tended to emphasize quality disproportionately.

- The reason most frequently given for not attending PGCC was the absence of post-associate courses and programs (28 percent); second most often heard were complaints that PGCC failed to offer the specific courses wanted or scheduled them inconveniently (21 percent). One in ten mentioned transportation problems.

- Past four-year college students, when asked "Why not PGCC?," most often cited the college's two-year status; those who had signed up with non-traditional providers most often said that the specific programs and class schedule PGCC offered failed to suit their needs.

The Nature of the Future or Potential Market

- Over two-fifths of the respondents said that they planned to take post-secondary classes in the next two years, compared to the quarter of the sample who claimed past course work.

- Since it is highly unlikely that future county college-level enrollments will actually grow that much by 1997, the course-planning subsample is best interpreted as representing the maximum *potential* postsecondary market (those with enrollment-inclined *attitudes*); future enrollment *behavior* is probably best represented by the past course-taking subsample since the size and shape of markets rarely change radically in the short run.

- PGCC led all competitors in potential market share (24 percent), followed by UMCP (22 percent). Maryland public four-year institutions as a group captured the largest share of the potential market--nearly two-fifths. Independent and out-of-state schools together accounted for 14 percent, and non-traditional providers for 5 percent.

- A comparison of past-provider and potential-provider subsamples suggested that PGCC has achieved a relatively low rate of market penetration. The implication is that there is opportunity for college enrollment growth.

- Demographically, survey respondents in the *potential* market subsample tended to be somewhat less educated, less well-off, older and more often from a minority racial background, compared with those in the *past* course-taker subsample.

Potential Student Motivations, Attitudes and Preferences

- When the potential student subsample was asked to gauge the importance of academic reputation, campus location, tuition costs and class size for their importance in provider selection using a 4-point scale, it rated all four factors at the "somewhat important" level or better. The most salient in their collective mind turned out to be tuition costs (scale mean = 3.45), the least salient was class size (2.99).

- Respondents inclined toward PGCC and non-traditional providers emphasized tuition and course costs in provider selection. Along with potential students choosing a Maryland public four-year school, PGCC potential students also were disproportionately inclined to highlight the salience of campus location. Maryland public four-year, private, and out-of-state university groups demonstrated above-average concerns about academic reputation.

- Responding to an open-ended question on how PGCC might improve its enrollment chances with them, potential students most often stated that that the college institute post-associate academic programs or even become a senior institution (cited by 26 percent).

- Other recommendations were: offer classes at more convenient locations or help with transportation (9 percent), cut tuition or provide scholarships (8 percent), and provide a more convenient course schedule and improve the registration process (6 percent). Only four percent of the respondents mentioned academic rank and instructional quality concerns.

- Definite majorities favored weekday classes over weekend classes (although half stated that they would be willing to enroll in a course meeting on Sunday) and preferred morning to evening meetings. Least popular were afternoon meetings.

- When asked about term attendance plans, a large majority hoped to enroll during both major semesters; among those who did pick a single term, the fall semester was the favorite. Very few expected to attend only in the summer.

PGCC County-Wide Image and Exposure

- Compared with other area community colleges, PGCC enjoyed a high reputation (very good, 40 percent; somewhat good, 55 percent). In terms of cost, however, the college did not enjoy the same happy consensus: 29 percent said that a PGCC education was either somewhat or very expensive.

- Among all the community outreach efforts and student recruitment programs employed by the college, only its mass mailing of course schedules was asked about in the survey. Three-quarters of the respondents remembered having received the bulletin, and three-quarters of them claimed to have read it--for an effective contact rate of around 50 percent.

- Past and potential PGCC students recalled receiving and reading the bulletin in overwhelming numbers; past students of non-traditional course providers, as a group, also registered a high rate of effective bulletin exposure. Bulletin receipt and reading was reported far less among past and potential four-year school respondents.

Marketing Plan Enrollment Objectives

During the fall 1995 semester, administrators in Advancement and Planning and Student Services jointly developed fall enrollment objectives for presentation to the Marketing Council. Specific headcount enrollment targets were developed for three market segments: current students, students entering college the fall following their high school graduation, and community adults. OIRA enrollment projections provided a baseline for development of the enrollment management objectives.

Current Students

Approximately half of the students enrolled each fall attended PGCC the prior spring--a reminder that currently enrolled students constitute a primary enrollment management market. Retention warrants as much attention as recruitment in maintaining enrollment and revenue levels. Prior studies have shown that students attending five or more terms, though accounting for only about one in every four students, together generate more total credit hours than the much larger number of students enrolling for four or fewer terms. In other words, students retained over the long term are responsible for a majority of the college's FTEs.

Students Direct from High School

Students direct from high school, comprising half of PGCC's new, first-time college entrants each fall, are an especially important market segment because of their credit hour generation. Two-thirds of the students entering PGCC the fall immediately following their high school graduation enroll as full-time students.

The Maryland Office of Planning forecasts increasing numbers of 12th grade students in Prince George's County between now and the end of the decade. Thus, with an assumed constant enrollment rate, the college can expect increasing numbers of new students from the county schools.

The Adult Market

The third market segment comprises new college students who delayed college entry past the year of their high school class graduation, students transferring to PGCC after having attended college elsewhere, and students being readmitted to PGCC after an interruption in studies. For marketing purposes, this is the adult market exclusive of those currently attending PGCC.

County residents age 20 to 34 are projected to decline by nearly 10 percent between now and the year 2000. People in this age group account for a majority of the credit students at PGCC. Due to decreases in this age group, OIRA projects a continuing, steady decline in credit students at PGCC through fall 1999, despite increasing numbers of students entering the college directly following high school.

Fall Credit Headcount Forecasts, 1996-1999

	Market:	Current Students	High Schools	Community Adults
Fall	Total Headcount	Continuing from Spring	Direct from High School	Delayed Entry, New Transfers, and Readmits
1990	13,087	6,412	1,426	5,249
1991	13,307	6,544	1,303	5,460
1992	13,318	6,690	1,306	5,322
1993	12,955	6,565	1,280	5,110
1994	12,201	6,243	1,175	4,783
1995	12,050	6,115	1,241	4,694
Projections:				
1996	*12,079*	*6,019*	*1,301*	*4,759*
1997	*12,057*	*6,033*	*1,341*	*4,683*
1998	*12,031*	*6,022*	*1,409*	*4,600*
1999	*12,007*	*6,009*	*1,414*	*4,584*

Fall Enrollment Objectives

The headcount objectives prepared for the Marketing Council picture steadily increasing enrollment through fall 1999, in contrast to OIRA projections of modest but steady decline:

Fall 1996-1999 Credit Headcount Objectives Compared to OIRA Forecasts								
	Market:		Current Students		High Schools		Community Adults	
	Total Headcount		Continuing from Spring		Direct from High School		Delayed Entry, New Transfers, and Readmits	
Fall	Forecast	Goal	Forecast	Goal	Forecast	Goal	Forecast	Goal
1996	*12,079*	12,180	*6,019*	6,080	*1,301*	1,300	*4,759*	4,800
1997	*12,057*	12,340	*6,033*	6,200	*1,341*	1,340	*4,683*	4,800
1998	*12,031*	12,530	*6,022*	6,320	*1,409*	1,410	*4,600*	4,800
1999	*12,007*	12,680	*6,009*	6,460	*1,414*	1,420	*4,584*	4,800

These students are projected to generate the following fall credit hours:

Fall 1996-1999 Credit Hour Objectives Compared to OIRA Forecasts								
	Market:		Current Students		High Schools		Community Adults	
	Total Credit Hours		Continuing from Spring		Direct from High School		Delayed Entry, New Transfers, and Readmits	
Fall	Forecast	Goal	Forecast	Goal	Forecast	Goal	Forecast	Goal
1996	*86,348*	88,481	*44,827*	45,296	*14,633*	14,625	*26,888*	28,560
1997	*86,226*	89,825	*44,931*	46,190	*15,083*	15,075	*26,212*	28,560
1998	*86,104*	91,507	*44,849*	47,084	*15,847*	15,863	*25,408*	28,560
1999	*85,980*	92,662	*44,753*	48,127	*15,904*	15,975	*25,323*	28,560

Summary

The Office of Institutional Research and Analysis prepared this *Annual Market Analysis* to support the work of the college's enrollment management team, Marketing Council, and others concerned with student recruitment. It presents the major findings of a number of OIRA studies, including insights gained from the most recent surveys of high school students, county adults, and PGCC entrants.

This *Annual Market Analysis* was largely limited to analyses of the market for degree-credit students. Half of the students who take classes at PGCC enroll in noncredit, continuing education courses, and these students generate 30 percent of collegewide FTEs.

The research office encourages suggestions as to how we could improve this document. Please contact OIRA in Kent Hall room 231, call x0723, or e-mail the director (at cc5@pgstumail.pg.cc.md.us.) with your ideas.